



Digitization of End-to-End Quote-to-Order Process for a Large Pharmaceutical Company

Insight

The client had Salesforce CRM but was manually configuring quotes and creating proposals. However, the product structure and pricing rules were complex, and the client was finding it hard to manage different business scenarios.

Forsys aided the client in automating the quoting and contracting processes. As a result, the client can customize and configure the complex pricing scenarios, enable e-Signatures, and more.



Industry Hospitals and Healthcare	Revenue \$263+ B	Employees 10,001+	Headquarters Irving, Texas
---	----------------------------	-----------------------------	--------------------------------------

Business Challenge



Manual creation of configuration and proposal



Complex product structure and pricing



Product structures and pricing are based on the locations where the services are available



Lacked relationships between product attributes at different locations

Transformation Journey

To automate the quoting process and help the pharmaceutical distributor handle different business scenarios, Forsys approached the challenges in the following way:

- ➔ Implemented Conga CPQ and CLM solutions.
- ➔ Automated the existing Quoting process with Conga CPQ solution.
- ➔ Enabled handling of different Business Scenarios for the client.
- ➔ Defined Pricing Rulesets and Price Matrix across markets.
- ➔ Defined NetPrices of specific products based on the facilities.
- ➔ Incorporated the NetPrices as a part of Configuration.

Impact

- ✔ Automated the Quote-to-Order process and reduced Quoting time by ~38%.
- ✔ Configured complex pricing scenarios with minor customization. Reduced rouge discounting by ~32%.
- ✔ Supported the Price Rulesets and Price Matrix for configuration.
- ✔ Enabled Quote approvals and e-Signatures as a part of the process.
- ✔ 360° digitization of the quote proposals and order process.

About the Client

The client, headquartered in Texas, distributes pharmaceuticals products, medical supplies, and health care systems. The company provides health information technology and extensive network infrastructure for the healthcare industry. The company's solutions help healthcare organizations address challenges.

Solution Components

Conga CPQ and CLM